

# Welcome to “In The Know” QBO Monthly Update Webinar (USA content)

Host – Wesley Booth

We will start at 11:00 am PT

## Host

# Wesley Booth

Customer Care Agent

### About Wesley

- National Accounts Care Team
- Passion for Training the Team
- 4 Years at Intuit
- Tucson, AZ



Hello and Welcome, I am Wesley and I'll be your host today.

Welcome to the "In The Know" monthly webinar - our main focus is "What's new in QuickBooks Online this month."

I and have been taking your support calls for 4 years and am now part of the National Accounts team handling their support issues.

## **Agenda**

**Announcements – QBO/QBOA Updates**

**ProAdvisor - Reimagined Training and Certification**

**Find-a-ProAdvisor - Matching for Tax**

**Practice Mgmt - Easily add non-QBO clients to QBOA**

**Sales Tax - Migration to Auto Tax calculations & Feature Updates**

**QBO Windows App new features**

**(USA content focus – other regions may have some differences)**

**CPE Credit & Learning objectives.....**



# CPE Process

---

In order to receive CPE credit:

- You must answer all polling questions throughout the training
- This webinar is eligible for up to 1.5 hours of CPE
- CPE certificates are emailed directly to you within 3 weeks of the training date to the email address you used to register
- **TIP:** Add accountant\_training@intuit.com to your approved email sender list. Or, check your SPAM folder.

Intuit Proprietary and Confidential

\*\*\*Need to insert a CPE keyword slide in this deck\*\*\*

[Read the bullets, then add these tips]

- CPE certificates are e-mailed directly to you within 3 weeks to the same email address used to register.  
**TIP:** Add accountant\_training@intuit.com to your approved email sender list. Or, check your SPAM folder.
- You must keep a copy for your records.

# CPE – Learning Objectives

February 12, 2018

- Know about the new ProAdvisor training and recertifications
- Find-a-ProAdvisor enhancements to engage more prospective clients
- QBOA Practice Mgmt - why and how to bring all your clients into QBOA
- Sales Tax - see how easy it is to migrate QuickBooks Online clients
- QBO Windows App new features

ProAdvisor - Show the new Proadvisor re-imagined experience with easy to find modules and trainings. Show the new intro course and new recertification path.

Find-a-ProAdvisor - Visitors seeking tax help on the current Find-a-ProAdvisor experience feel like Find-a-ProAdvisor is not “meant for me”. Enhancements are being made to allow you to better highlight your expertise as it relates to tax and encourage engagement from visitors seeking tax help.

QBOA Practice Mgmt - why and how to bring all your clients into QBOA

Sales Tax - show how easy migrating to the automated sales tax experience is and how the new feature can ease frustration and time spent for accountants.

Accountant University



**Free Training Events**

- Basic to Advanced
- QuickBooks Online for Accounting Professionals
- Courses are designed and presented by Advanced Certified ProAdvisors
- Most include CPE

**[www.qbtrainingevents.com](http://www.qbtrainingevents.com)**

<b>Webinars</b>	<b>In-Person Training Events</b>	<b>Virtual Conference Events</b>
<p>Weekly webinars to help you grow your practice, and become a trusted advisor:</p> <p><u>Sample Topics:</u></p> <ul style="list-style-type: none"><li>- Certification Training</li><li>- Increase your Profitability with Schedule C Clients</li><li>- Manage and Scale your Accounting &amp; Tax Firm</li></ul>	<p>In-person training tour visiting many location across the U.S.</p> <ul style="list-style-type: none"><li>- Coming in May 2018</li></ul>	<p>Free training, CPE and networking with your peers and Intuit product experts.</p> <ul style="list-style-type: none"><li>- Coming in March 2018</li></ul>

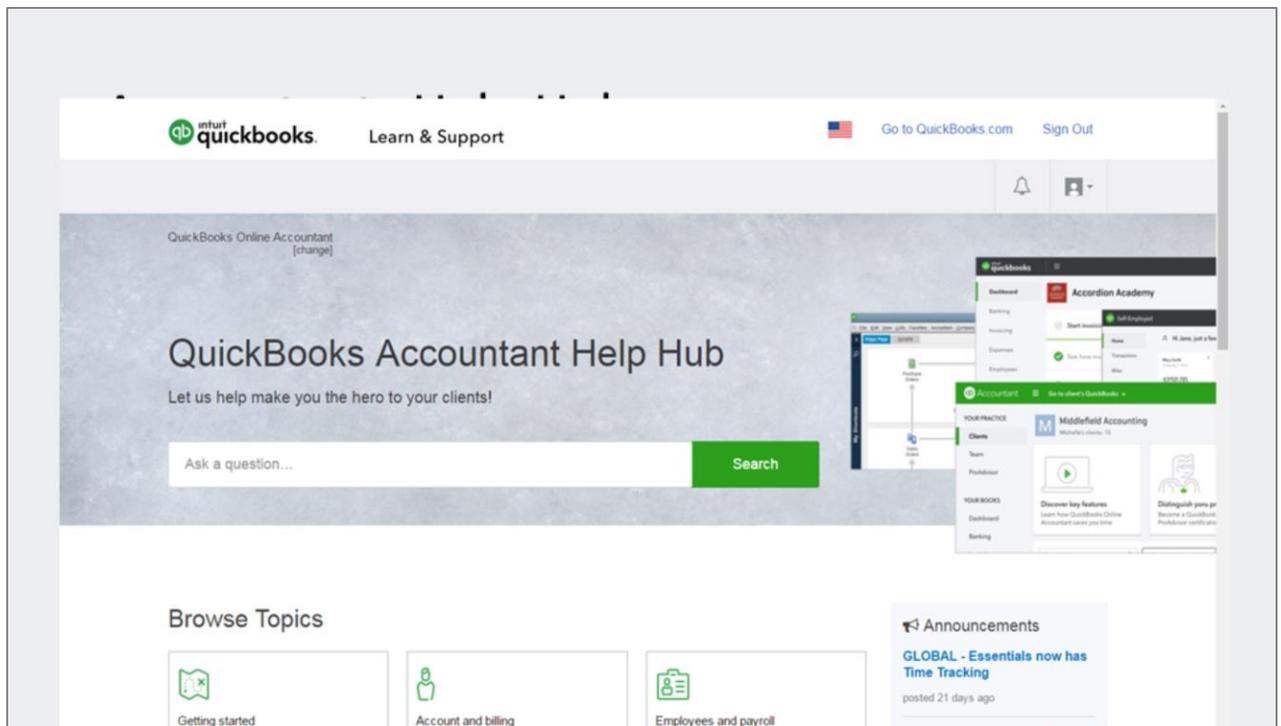
[www.qbtrainingevents.com](http://www.qbtrainingevents.com)

Link in the webinar follow up email.

# QuickBooks Online Tutorials - [www.qbtrainingevents.com](http://www.qbtrainingevents.com)

The screenshot displays the QuickBooks Online website interface. At the top, the navigation bar includes the Intuit QuickBooks logo, links for 'Small Business' and 'Accountants', and a 'Learn & Support' dropdown menu which is highlighted with a red circle. The dropdown menu contains the following items: 'QuickBooks Help', 'QuickBooks University' (highlighted with a red circle), 'Find a QuickBooks Expert', 'Small Business Center', and 'QuickBooks Online Blog'. To the right of the navigation bar is a search box with the text 'Search' and a magnifying glass icon. Below the navigation bar, the main content area features the heading 'Quick Books Tutorials' and two tabs: 'Small Business' (highlighted with a red circle) and 'Accountants'. A horizontal menu of icons represents various business functions: ACCOUNTING, INVOICING, SALES, TAXES, EXPENSES, INVENTORY, PAY EMPLOYEES, and BILLS. Below this menu, three tutorial cards are displayed, each with a play button icon and a title: 'What Are QuickBooks Apps?', 'Reconcile your accounts', and 'Add a user'.

<https://quickbooks.intuit.com/> > Under: Learn & Support > QuickBooks Tutorials



DEMO – Accountant Help Hub

Show QBOA access to AHH

Show AHH page

Show ITK link & Page

Show right side > Additional Resources > Training & Tutorials > Accountants > Training Events

Past in chat

Additional Resources > Training & Tutorials > Accountants > Training Events

We have a support site dedicated to providing the support articles you need fast – the Accountant Help Hub.

Please visit this page and save the link – we have designed this so you can get the answers you need fast.

The link will be in the follow up email message you will receive immediately at the end of this webinar.

# QBO – Updates Progress Invoicing - Beta

More functionality for Products & Services

**(Presentation done in the Feb 6 webinar)**

# Progress Invoicing - coming soon

- Concluding beta for US, Canada, Australia, and UK Customers
- Progress invoicing will be rolling out to Customers over the next few weeks, so some will have it while others will not.
- All Customers who have progress invoicing will also have the email HTML setting:

- Gear, Custom Form Styles
- In the template Content tab are two settings to show Estimate/Invoice Summary, and progress invoicing calculations

Account and Settings			
Company	Company type	Tax form	
Billing & Subscription	Chart of accounts	Enable account numbers	Off
Sales		Shipping account	Shipping Income
Expenses		Discount account	Discounts given
Payments	Categories	Track classes	Off
Advanced		Track locations	Off
	Automation	Pre-fill forms with previously entered content	Off
		Automatically apply credits	Off
		Automatically invoice unbilled activity	Off
		Copy estimates to invoices	On
		Enable progress invoicing <small>beta</small>	Off
		Automatically apply bill payments	On
	Projects	Use project financial tracking	Off
	Time tracking	Add Service field to timesheets	Off

## Steps to join Progress Invoicing beta

- Please email [progressinvoiceingbeta@intuit.com](mailto:progressinvoiceingbeta@intuit.com)
- Please include the company ID for your QuickBooks or your client's QuickBooks account with your email

(To find your Company ID hold down **Ctrl + Alt + ?** while inside QuickBooks Online, your Company ID will display on the screen. )



# QBO – Updates IOP4A User ID Changes

Security Update for Payroll Login

**(Presentation done in the Feb 6 webinar)**

## IOP4A User ID Changes

To increase security and better protect your client's sensitive data, Intuit Online Payroll for Accountants will resume User ID updates in March.

IOP4A accountant and client accounts will be moved to the Intuit central login credential system.

Dedicated support provided for you and your clients:

March 5<sup>th</sup> -May 4<sup>th</sup>

**(844) 391-9894**

Mon- Fri 6 AM to 6 PM PT

Our central authentication system has a single method for resetting passwords. We will use this same Intuit-branded flow for resetting Intuit Online Payroll for Accountant passwords

- Benefits include multi-factor authentication and monitoring of suspicious login activity

(844) 391-9894

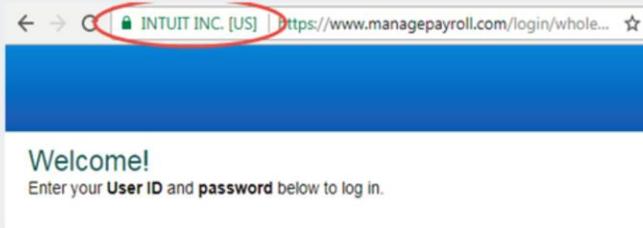
This toll-free phone number will be activated when migrations start on March 5<sup>th</sup> and will be monitored during our usual support hours, from 6 AM to 6 PM PT, Monday through Friday. If you wish, you may direct your clients to contact us at that phone number for login migration help. We will answer the phones as "Online Payroll" but there may be instances where we must inform your clients during the call that they are moving to Intuit credentials

## IOP4A User ID Migrations

Users will be prompted to update their user IDs at login.

There will be times when the Intuit brand is exposed:

- Self service password resets
- Browser security certificate



**QuickBooks Community Help Article:** Intuit Online Payroll for Accountants: Changes to accountant and client online payroll logins

Legal Privacy Security  
© 2017 Intuit, Inc. All rights reserved. Intuit, QuickBooks, QX, TurboTax, ProConnect and Mint are registered trademarks of Intuit Inc. Terms and conditions, features, support, pricing, and service options subject to change without notice.

<https://community.intuit.com/articles/1599012-intuit-online-payroll-for-accountants-changes-to-accountant-and-client-online-payroll-logins>

# ProAdvisor

Re-imagined Training and Certification

## Presenter

# Kavya Mallesh

Product Manager

### About Kavya

- QuickBooks Online Accountant
- Passionate about helping accountants confidently deliver amazing services to their clients
- 1 year at Intuit
- Mountain View, CA



Role at Intuit.... Product Manager on the QuickBooks Online Accountant Team

Intuit Passion..... Passionate about the Proadvisor program and help accountant confidently deliver amazing services to their clients

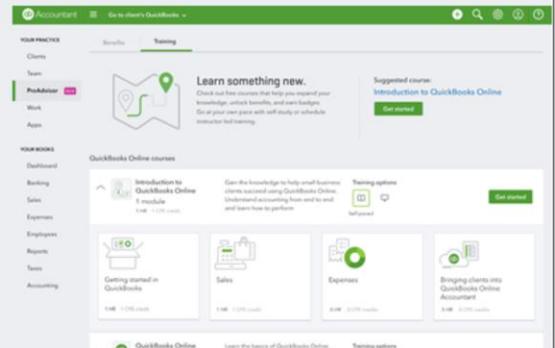
We talked to accountants and Proadvisors and **LEARNED 3 BIG THINGS:**

- 1: Accountant are looking for specific training topics and training channels**  
and it's not easy to find training they care about all in one place
- 2: Accountants are looking for more engaging content**  
and most of the training is not interactive
- 3: Accountants are looking to distinguish their business**  
and feel confident to support their clients

**Accountant are looking for specific training topics and training channels** and it's not easy to find training they care about all in one place  
**Accountants are looking for more engaging content** and most of the training is not interactive  
**Accountants are looking to distinguish their business** and feel confident to support their clients

## New ProAdvisor experience include

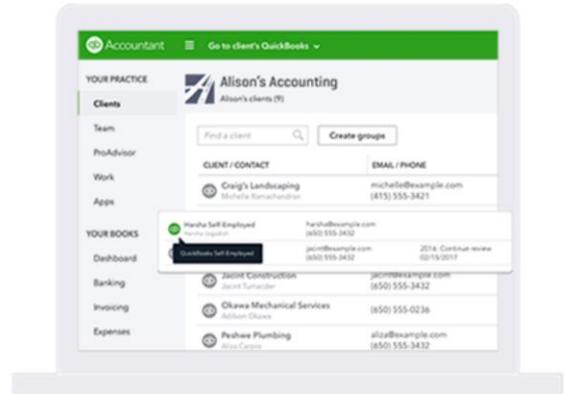
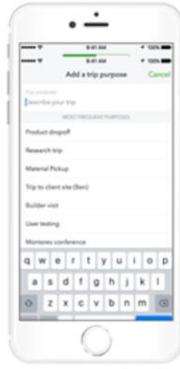
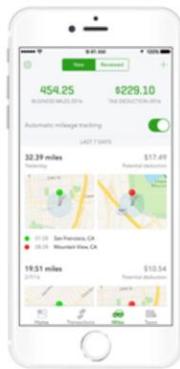
- New training courses and a new re-certification path
- New re-imagined experience
  - New Training page with easy to find modules
  - New benefits experience
  - New engaging content
  - Registration to Webinars and Live-events
  - Recommendations



- New training courses and a new re-certification path
- New re-imagined experience
  - New Training page with easy to find modules
  - New benefits experience
  - New engaging content
  - Registration to Webinars and Live-events
  - Recommendations

## New Training Courses: Expand your expertise with new Specialty Training

We will be introducing Specialty training to expand your expertise across the ecosystem of QuickBooks products and services. The first offering will be QuickBooks Self-Employed.

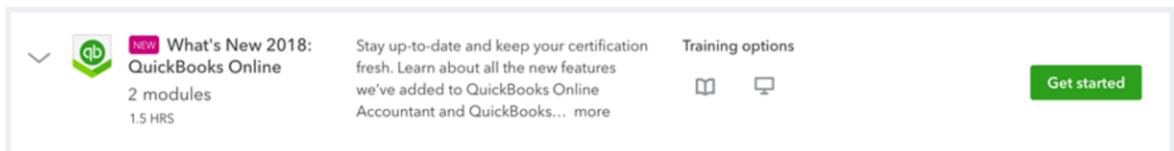


We will be introducing Specialty training to expand your expertise across the ecosystem of QuickBooks products and services. The first offering will be QuickBooks Self-Employed. We will continue to grow the catalog to Payroll, tax etc

## Simplified recertification process

Currently, QuickBooks Online Certified ProAdvisors must take the full certification exam each year to maintain certification status. Moving forward, QuickBooks Online Certified ProAdvisors can instead complete a shorter recertification exam each year.

“What’s New” training & exam will be available each year focused on what has changed in QuickBooks Online since the prior year.

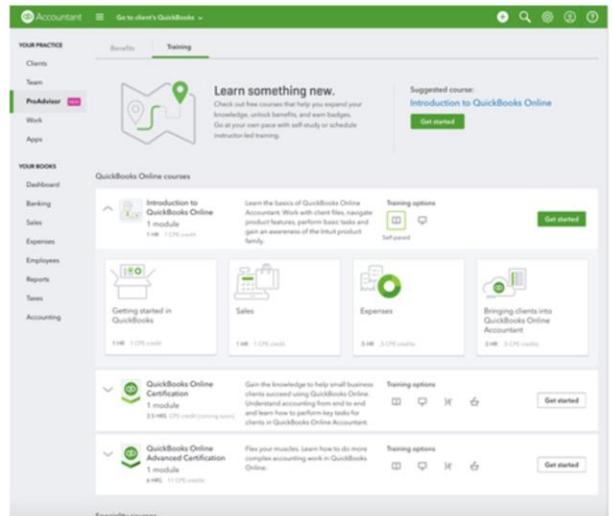
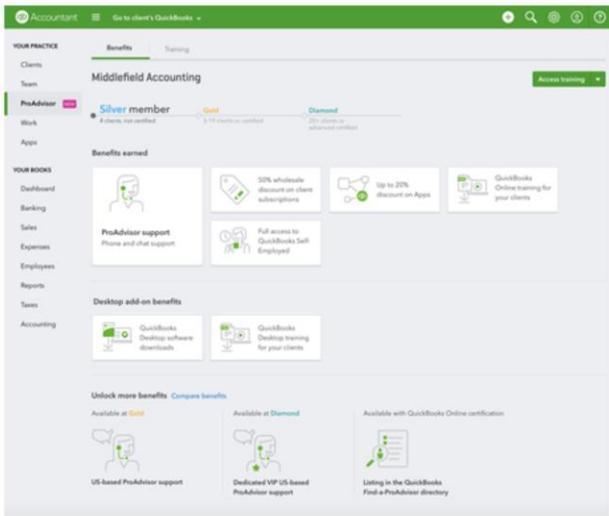


The screenshot shows a training card with a dropdown arrow on the left. The card features the QuickBooks logo, a 'NEW' badge, and the title 'What's New 2018: QuickBooks Online'. Below the title, it lists '2 modules' and '1.5 HRS'. The main text reads: 'Stay up-to-date and keep your certification fresh. Learn about all the new features we've added to QuickBooks Online Accountant and QuickBooks... more'. To the right, under 'Training options', there are icons for a book and a monitor. A green 'Get started' button is located at the bottom right of the card.



Currently, QuickBooks Online Certified ProAdvisors must take the full certification exam each year to maintain certification status. Moving forward, QuickBooks Online Certified ProAdvisors can instead complete a shorter recertification exam each year.

“What’s New” training & exam will be available each year focused on what has changed in QuickBooks Online since the prior year.



Two New Tabs - Benefits and Training  
 Benefits - Consolidates all Benefits including Desktop  
 Training - New experience with easy to find module. New ways to take training

# Questions?



Now we will take Questions

# Find-a-ProAdvisor

Matching for Tax

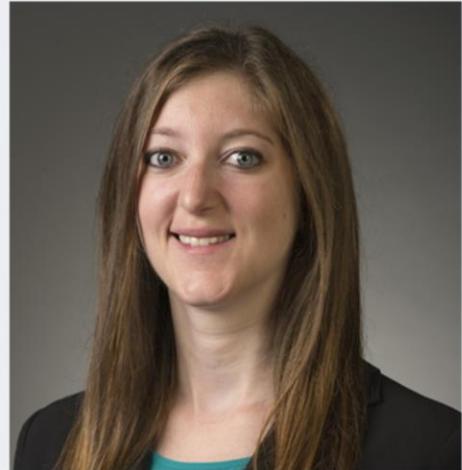
## Presenter

### Leah Wetzel

Product Manager

#### About Leah

- QuickBooks Online Accountant
- Passionate about connecting Small Businesses with their most trusted advisors!
- 1 year at Intuit
- Mountain View, CA



Role at Intuit.... Product Manager on the QuickBooks Online Accountant Team

Intuit Passion..... Connecting Small Businesses with their most trusted advisors!

Personal interest item.... I love to cook!

## Matching for Tax

Visitors seeking tax help on the current Find-a-ProAdvisor experience feel like Find-a-ProAdvisor is not “meant for me”

### Why this matters:

- Most accountants who use QBOA provide multiple services for their clients, including tax
- 65% of an accountant’s revenue comes from serving tax clients



Visitors seeking tax help on the current Find-a-ProAdvisor experience feel like Find-a-ProAdvisor is not “meant for me”. Enhancements are being made to allow you to better highlight your expertise as it relates to tax and encourage engagement from visitors seeking tax help.

## Matching for Tax

### Search Enhancements Include:

- Prominent Display of Tax-related Credentials
- Free Consultation
- New “Services Provided”

The screenshot shows the 'Find a ProAdvisor' search interface. At the top, there are four filter boxes: 'Location' (Middlefield, CA), 'Industry served' (Lawn care / Landscaping), 'Services provided' (What services do you need?), and 'Product supported' (QuickBooks Online). Below these is a 'Distance within 10 miles' dropdown and a 'Sort by Best match' dropdown. The results show 176 accountants found near Middlefield, CA. The first result is for William Hansen, CPA, an Advanced ProAdvisor with 38 reviews and a 4.5-star rating. His profile includes a photo, name, title, company (Middlefield Accounting), address (Middlefield, CA 98756), and a mission statement. A blue badge indicates he 'OFFERS FREE CONSULTATION'. Below the profile are four QuickBooks product logos: Online (ADVANCED), Desktop (ADVANCED), Enterprise, and Point of Sale. To the right of the profile, a 'Services' list includes Audits / Reviews / Compilations, Bookkeeping, Income tax preparation / planning, and QuickBooks phone consultation, with '+ 2 more'.

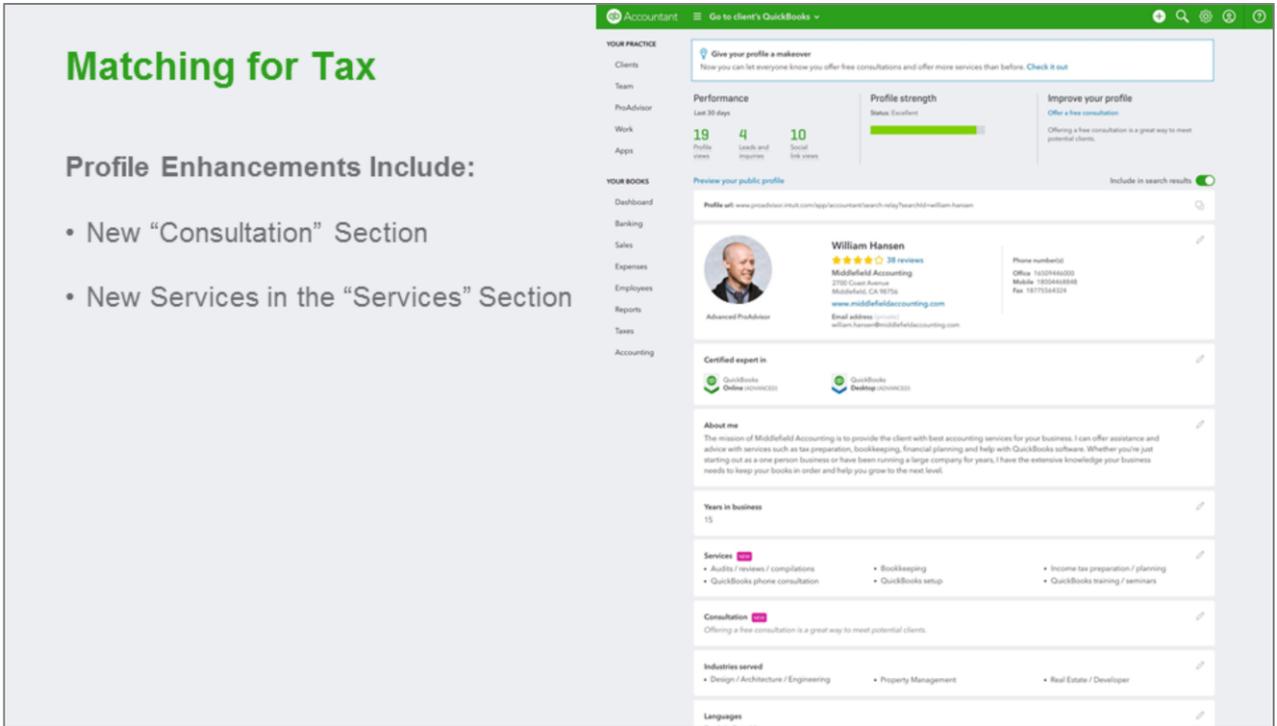
Enhancements include updates to the Find-a-ProAdvisor search experience, including a seasonal quick link which will perform a quick and easy tax-search and tweaks to the current “Send Message” text to reflect tax-related inquiries. Additional enhancements include both changes to the Find-a-ProAdvisor Search Experience and the ProAdvisor Profile, including:

- Prominent Display of Tax Related Credentials (CPA, EA)
- Free Consultation
- New “Services Provided”

# Matching for Tax

## Profile Enhancements Include:

- New “Consultation” Section
- New Services in the “Services” Section



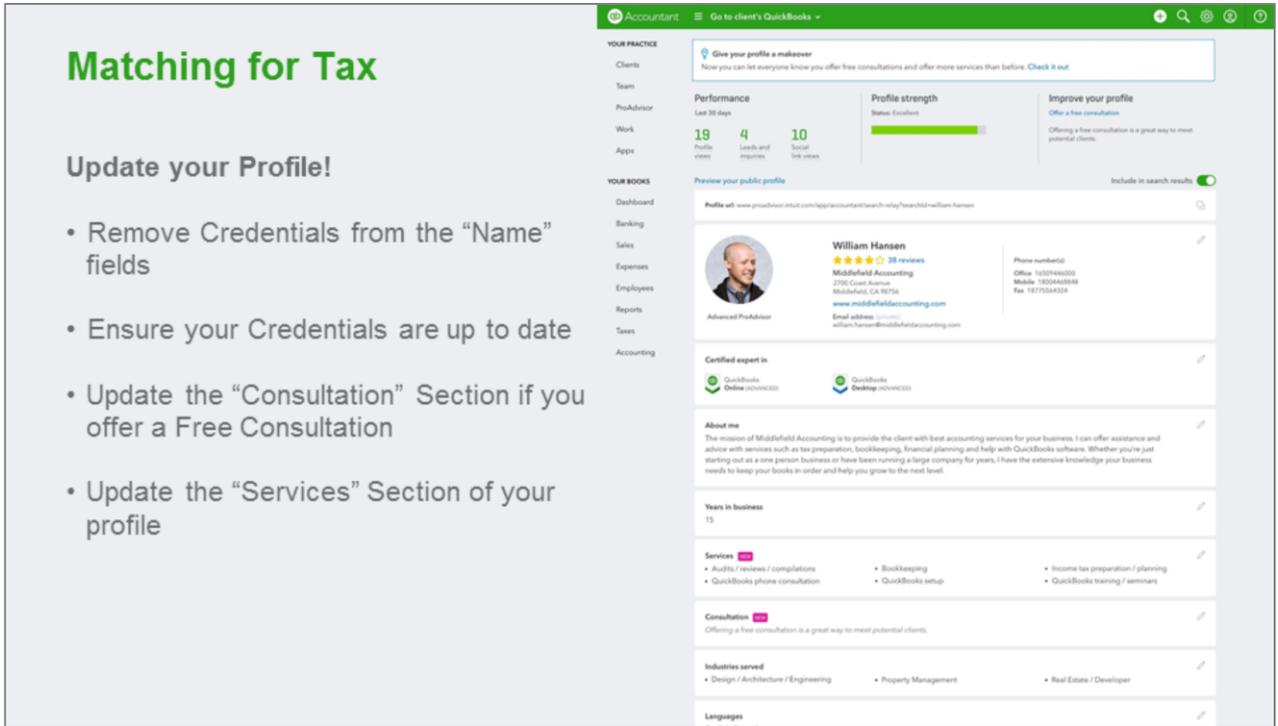
Additional enhancements include both changes to the Find-a-ProAdvisor Search Experience and the ProAdvisor Profile, including:

- Prominent Display of Tax Related Credentials (CPA, EA)
- New “Consultation” Section
- New Services in the “Services” Section

# Matching for Tax

## Update your Profile!

- Remove Credentials from the “Name” fields
- Ensure your Credentials are up to date
- Update the “Consultation” Section if you offer a Free Consultation
- Update the “Services” Section of your profile



As a result of these enhancements, it is important that you review your ProAdvisor profile and ensure it is up-to-date. Pay special attention to the following:

1. Remove Credentials from the “Name” fields
2. Ensure your Credentials are up to date
3. Update the “Free Consultation” section if you offer a free consultation
4. Update the “Services” section of your profile

# Questions?



Now we will take Questions

# Practice Management

Easily add a client (without a QBO subscription) to QBOA while creating work and client requests

## Presenter

### Michael Hitchcock

Product Manager

#### About Michael

- Product leader for QBOA Practice Mgmt
- Passionate about helping accountants embrace the cloud to manage their practice
- 4 years at Intuit
- Live in San Francisco, CA; work in Mountain View, CA



Role at Intuit....Product Manager for QuickBooks Online Accountant Practice Management

Intuit Passion.....Helping accountants embrace the cloud to manage their practice

Personal interest item....Running, hiking, and exploring national parks

We observed and talked to accountants and **LEARNED 3 BIG THINGS** about their work:

**1: It's completely deadline-driven**

...and the number of deadlines is insane!

**2: Accountants use tools & processes to create structure**

...trying to make sure nothing falls through the cracks

**3: Tools require constant maintenance**

...and none of them "live" where accountants do the actual work

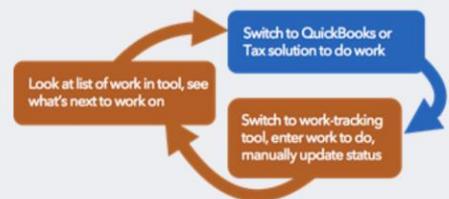
Missing a deadline



Numerous tools



Context switching



We used these learnings as the foundation to build the mission and vision for QBOA Practice Management

## Practice Management Mission

We want to give accountants **confidence** that nothing will fall through the cracks without creating a maintenance burden for their team

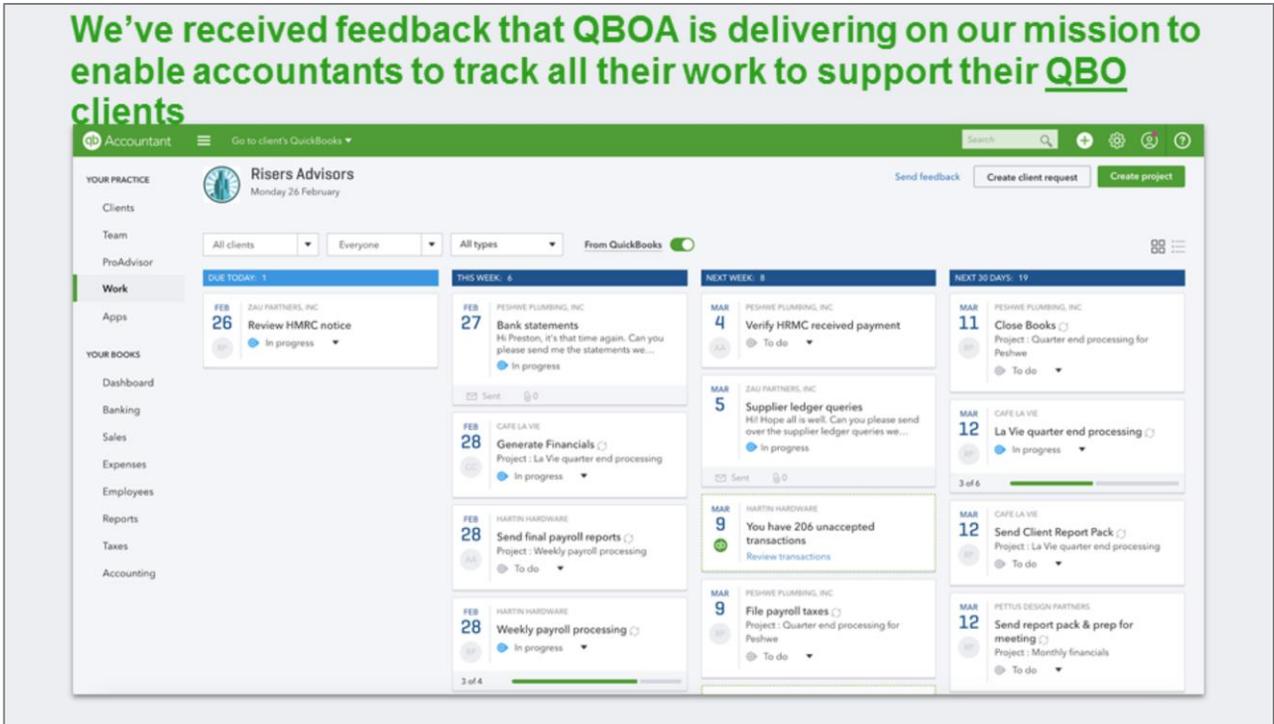
## Practice Management Vision

QBOA is the one place to **manage all your clients** and work across all your services (books, tax, payroll, and 3P apps)



Today, we'll focus on the “manage all your clients” aspect of the vision

# We've received feedback that QBOA is delivering on our mission to enable accountants to track all their work to support their QBO clients



This is the current state of QBOA Work, which is where accountants can go to create and manage projects, tasks, and client requests

**...but our #1 VOC is it's not easy to track work for clients who don't use QBO**

*"I have clients that are not on QBO yet and I need to manage tasks for them. Why can I not add a client to QBOA who's not on QBO?"*

– Gabriel in Canada



2/3 of accountants we talk to say that they don't think QBOA allows them to add their clients who don't have a QBO subscription. It can be done with the "Add client" button on the Clients tab, but it's not obvious. Today, most of the accountants who know how to add their clients who don't have a QBO subscription do it through their Firm Books by going to Sales > Customers > New Customer.

We want to change the perception so accountants know that QBOA is for ALL of their clients.

## We want to change the perception that QBOA is only for managing your QBO clients so are releasing two new enhancements that will finish rolling out Mar 2

### Add / Edit client

Client contact information

Business  Individual

Business name \*  Email \*

Display name as  Mobile

[+ Add more info](#)

QuickBooks subscription [Compare](#)

Wholesale discount (firm is billed)  Direct discount (client is billed)  No subscription right now

**Plus** Most Popular  
60% off for life of the subscription £9.99/mo

**Essentials**  
50% off for life of the subscription £7.50/mo

**Simple Start**  
20% off for life of the subscription £4.99/mo

TOTAL £0/mo

Team access

Select which team members in your firm can access your client.

Rich Preece

### Quickly add clients without a QBO subscription from within Work tab

[Create client request](#) [Create project](#) ← 2 access points

#### Create project

Project name \*

On board new client

Client \*  Due date \*  Repeat

**+ Add New**

Bob's Bikes

Bob's Burgers

Miller's Masonry

Paul's Pies

Tasks

For you and your team. Tasks aren't shared with clients.

[Add a task](#)

#### Create project

Project name \*

On board new client

Client \*  Due date \*  Repeat

Add client

Name \*

New non-QBO client

Email \*

[Save](#)

[Add a task](#)

Select "+Add New" to add client to QBOA and start managing work for them

There are 2 changes that we've started rolling out.

The first is through the Add/Edit client flow which can be accessed by selecting the Add Client or Edit Client button from the Client tab. Here we've added another option - "No subscription right now" - that makes it easier to add a client without a QBO subscription. This can be done today by not selecting a QBO SKU and then saving the client, but it's not obvious to users. This drives the misconception that QBOA is not for ALL your clients.

The second is through "Quick add" which can be accessed through the Create client request or Create project buttons in the Work tab. There is now an option that says "+ Add New" that is always at the top of the client dropdown. Once you add the name and email address, the client is saved to your client list and you can immediately create projects, tasks, and client requests associated with that client.

# Questions?



 **intuit**  
**quickbooks.**

# Sales Tax

*You do the sales, we'll do your taxes*

## Presenter

### Lauren Kaminski

Senior Customer Experience Specialist

#### About Lauren

- QuickBooks Online - Customer Experience Specialist
- Passionate about solving the challenges small businesses face in managing their business and books
- 7 years at Intuit
- Tucson, AZ



Role at Intuit.... Sr Customer Experience Specialist – work as the customer advocate/voice of customer within the sales tax team. I take the feedback that customers provide and share this with the product team for enhancements and design changes.

Intuit Passion..... Love working with a team who strives to improve the customer experience. Really enjoyed seeing the excitement on customer’s faces at QBC while demoing the new tax experience.

Personal interest item.... Love reading and spending time with my kids.

## Challenges with manual Sales Tax experience

### Time consuming

- Track and apply constantly changing tax rates manually



### Confusing

- Decide what rates apply to which situations



### Frustrating

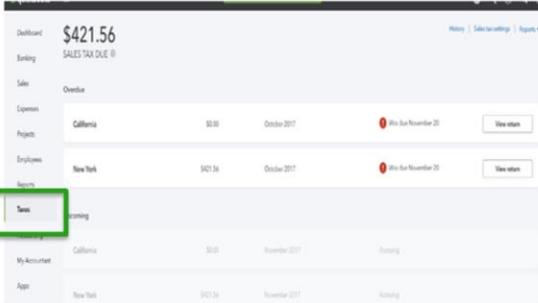
- Not knowing what's due when and if it's accurate



Time consuming, Confusing, Frustrating.... Just some of the things that come to mind when thinking about handling your sales tax. Quickbooks can make sales tax easy and take the frustrations away from you with the new automated sales tax features.

## Migrate to the new automated Sales Tax experience

- Get sales tax automatically calculated on transactions for your clients
- Help clients setup their tax nexus correctly with guided setup
- View current and upcoming Sales tax obligations across all tax agencies in one place
- Manage nexus & agency settings



The screenshot shows the QuickBooks interface for Sales Tax. At the top, it displays a balance of \$421.56. Below this, there are sections for Sales, Expenses, Projects, Employees, and Taxes. The Taxes section is highlighted with a green box. The Taxes section shows a table with columns for State, Amount, Due Date, and Status. The table lists California and New York with amounts of \$0.00 and \$421.56 respectively, both due on October 2017. There are also buttons for 'View status' next to each row.

State	Amount	Due Date	Status
California	\$0.00	October 2017	Missing
New York	\$421.56	October 2017	Missing

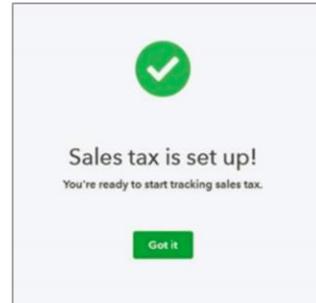
QBO Taxes tab – the one place you need to help your clients stay compliant with sales tax.

## Key Benefits for accounting pros

Expand your role as a *trusted advisor*

*Save time* – no more scanning government websites for tax rule changes or subscriptions to tax rate files,

Drive *confidence* by gaining sales tax insights into obligations across multiple tax agencies without second guessing



## Migration Flow - Sales Tax Setup

The image displays four screenshots from the QBO Sales Tax Setup migration flow. The top-left screenshot shows a dashboard with a 'Sales tax just got simpler' banner and three benefit cards: 'Personalized sales tax rates', 'Stay on top of payments', and 'Don't stress the rules'. The top-right screenshot is titled 'Set up sales tax' and asks for the business address, showing a form with a 'Looks good!' button. The bottom-left screenshot is also titled 'Set up sales tax' and asks 'How often do you file in California?' with radio button options for 'Monthly', 'Quarterly (every 3 months)', and 'Annually'. The bottom-right screenshot is titled 'Set up sales tax' and shows 'You're all set' with a list of tax rates: California State (STATE) at 4.25%, California, Santa Clara County (COUNTY) at 1%, and California, Santa Clara District (DISTRICT) at 1.75%, resulting in a total 'Your sales tax rate: 9%'.

Migration Landing page – Customer will see the option to switch to the new automated sales tax, or continue using their current (manual) sales tax for now. Choosing to switch, will guide through the migration flow.

1. Confirm your physical address (this is extremely important!) It will help QBO calculate sales tax at the right location.
2. Tell us how frequently you file your taxes. This information is provided to you by the tax agency. QBO uses this to remind you when your taxes are due.
3. You're set! We'll show the general tax rate for YOUR location (this does not take into account SHIP TO addresses, those will come into play on the actual transactions).

Customers can view the following Community article for more details:

<https://community.intuit.com/articles/1669564-migrate-to-us-automated-sales-tax>

## Auto Tax Calculations - Tax details

**Invoice #1010**

Invoice total: **\$5,171.56**

**PRODUCTIONS**

PRODUCER	DESCRIPTION	QTY	RATE	AMOUNT	TAX
1	1. Athletic Business - Mountain View (Line design with badge class)	1	4,000	4,000.00	
2	2. Single Athletic Packet	1	170	170.00	
3	3.				

Subtotal: \$4,170.00  
Sales tax: \$475.00  
Total: \$4,645.00

**Sales tax info**

We calculate sales tax for you based on where you are and what you sell. If you ship, we account for that, too.

Tax description	Invoice total	Rate	Tax total
California (State)	\$1,000.00	6.25%	\$62.50
Santa Clara (County)	\$1,000.00	1%	\$10.00
Santa Clara (District)	\$1,000.00	1.75%	\$17.50
<b>Total sales tax:</b>			<b>\$90.00</b>

[Override this amount](#)

**How we calculate sales tax**

Your business address  
2535 Garcia Ave  
Mountain View, CA 94043

Customer info  
 This customer is tax exempt  
 I'm shipping to this customer

Shipping address  
Ronald  
2535 Garcia Ave  
Mountain View, CA 94043 US

Rates may change based on where you ship.

**How each item is taxed**

Invoiced Item	Tax Category
Tulips	Athletic & sports equipment <a href="#">edit</a>

**User detail in the audit log** – You’ll be able to see the name of the team member who completed an action listed next to each corresponding activity. Knowing who’s worked on what activity will help you ensure the quality and integrity of the work you do for your clients.

It’s important to note that your clients will not see individual team names attached to actions when they view the audit log—they’ll only see the name of your firm next to each activity. If your client is connected to a second firm, you’ll see that firm’s name next to their corresponding QBO activities.

## Availability

Migrations to Auto Tax Calculations is available now to QBO users in the US with one sales tax agency.

The new details screen will be available for all Automated Sales Tax users later this week.



# Questions?



# New QBO Windows App

Replacing current Windows and Mac Apps

## Presenter

### Seth Pratt

Product Manager

#### About Seth

- Power Users / Desktop Client team lead
- Love building products to that make people's lives easier.
- 1 year at Intuit
- Mountain View, CA

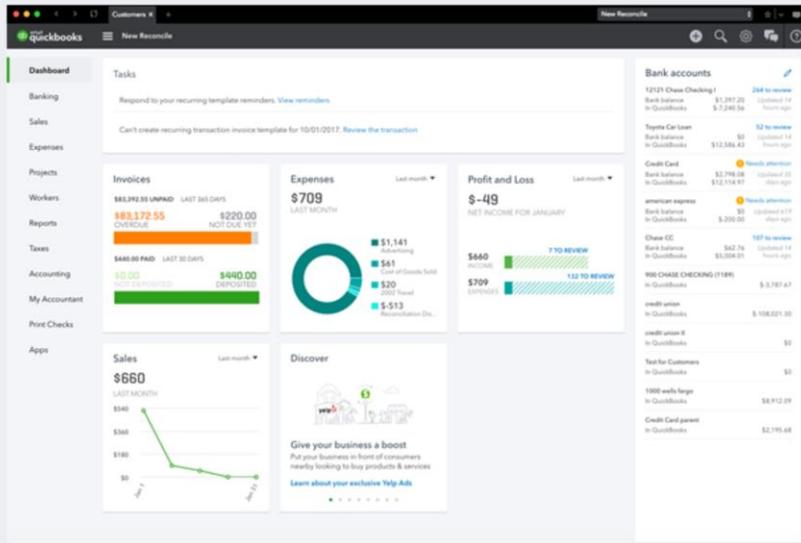


Role at Intuit..... I'm a Product Manager focused on solving problems Power Users and on our Desktop Clients.

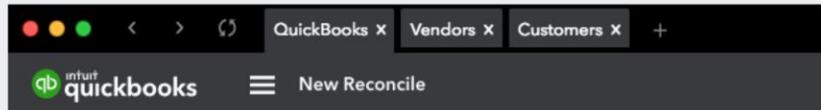
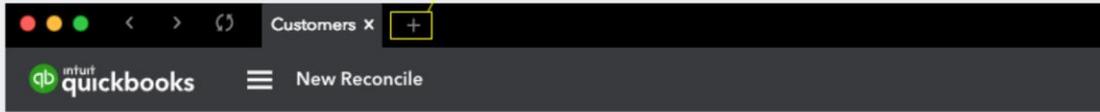
Intuit Passion..... Passionate about building products that delight and save you time!

Personal interest item.... In my free time, I am an avid backpacker, skier, and soccer player!

# In App Tabbed Browsing with Multiple Clients



# Taking a closer look...

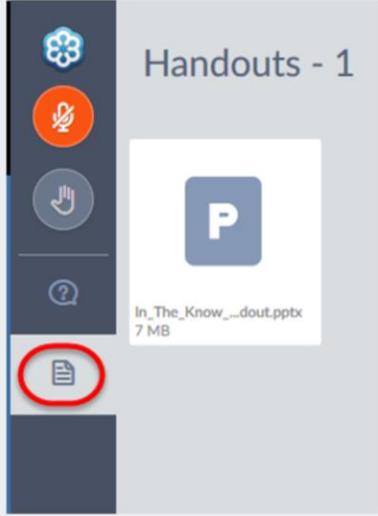


# Questions?



 **intuit**  
**quickbooks.**

Handouts - 1



The screenshot shows a software interface with a dark sidebar on the left containing several icons: a blue gear, a red microphone, a hand cursor, a question mark, and a document icon circled in red. The main area displays a presentation thumbnail with a blue square containing a white 'P', the filename 'In\_The\_Know\_...dout.pptx', and the size '7 MB'.

## Webinar Links

QuickBooks Training [www.qbtrainingevents.com](http://www.qbtrainingevents.com)

In The Know Webinar

<https://community.intuit.com/articles/1463613>

Accountant Help Hub

<https://community.intuit.com/quickbooks-accountant-us-en>

QuickBooks Online Feature Requests

<http://feedback.qbo.intuit.com/forums/168199-quickbooks-online-feature-requests>

<https://quickbooks.intuit.com/> > Under: Learn & Support > QuickBooks Tutorials

# Thanks for Attending

Accountants Help Hub

Accountant blog

YouTube channel

Online Feature Request website

**These links will also be in the email sent following this training.**

We have a number resources that will help provide information related to today's Training Session.

This event has been recorded, and the recording will be posted in about a week, here:

<https://community.intuit.com/articles/1463613-quickbooks-in-the-know-webinar-hub>

Accountants Help Hub

<https://community.intuit.com/quickbooks-accountant-us-en>

Accountant blog

<https://www.firmofthefuture.com/>

YouTube channel

<https://www.youtube.com/user/intuit>

<https://www.youtube.com/user/Quickbooks>

Online Feature Request website

<http://feedback.qbo.intuit.com/forums/168199-quickbooks-online-feature-requests>